THE HOUSING SPECIALIST™

Housing Specialist Caseload Prioritization & Weekly Work Planner

Manage the working week across multiple housing cases
Priority-setting • Deadlines • Follow-ups • End-of-week review

Professional Resource #20 • 6 Pages • 117+ Interactive Fields • Printable • Free
Housing Specialist Hub → Working With Clients

Planner Information

Housing Specialist: _____ **Week of:** _____

Organization / Team:
_____

1. Weekly Priority Planner

Identify the three most important outcomes for this week. Everything else should support these priorities.

This Week's Top 3 Outcomes

1. _____
Why it matters: _____

2. _____
Why it matters: _____

3. _____
Why it matters: _____

Capacity Check

- ■ I have a realistic view of how many active cases I can meaningfully progress this week
- ■ I have identified any cases that are waiting on external parties (agency, landlord, client)
- ■ I know which tasks require same-day or next-day attention
- ■ I have flagged any capacity concerns for my supervisor if needed

2. Caseload Priority Matrix

Organize active cases by urgency and next action. Use case codes — do not write full client names on this working paper.

Case Code	Priority	Deadline / Key Date	Next Action	Owner	Done

Priority codes: U = Urgent (today/tomorrow) H = High (this week) S = Standard W = Waiting on others

3. Weekly Time-Block Planner

Plan focused work blocks from Monday through Friday. Protect time for outreach, documentation and follow-up.

Monday

Morning focus	_____
Afternoon focus	_____
Key calls / meetings	_____

Tuesday

Morning focus	_____
Afternoon focus	_____
Key calls / meetings	_____

Wednesday

Morning focus	_____
Afternoon focus	_____
Key calls / meetings	_____

Thursday

Morning focus	_____
Afternoon focus	_____
Key calls / meetings	_____

Friday

Morning focus	_____
Afternoon focus	_____
Key calls / meetings	_____

4. Follow-Up & Communication Log

Track client, landlord, broker and agency communications so commitments are visible and followed through.

Date	Case	Who (Client/LL/Agency)	Method	Outcome / Commitment	Next

Method: P = Phone E = Email T = Text I = In-person Ptl = Portal

5. Deadlines, Risks & Escalations

Identify urgent issues that require attention this week. Distinguish safety/legal concerns from routine administrative work.

Urgent Items This Week

Case Code	Issue Type	Deadline	Action Required	Escalated?

Issue Type examples: Court date • Voucher expiration • Move-in this week • Safety concern • Payment interruption • Landlord deadline

Escalation Checklist

- ■ Any safety or illegal lockout concern has been escalated the same day
- ■ Court papers or imminent eviction risk has been referred to legal services / supervisor
- ■ Capacity overload has been raised with the supervisor rather than silently dropped
- ■ Employer escalation procedures have been followed

6. Friday Review & Next-Week Handoff

Close the week cleanly. Capture what was achieved, what remains open, and what must be carried forward.

This Week's Results

Metric	Number / Notes
Priority outcomes completed	
Client follow-ups completed	
Landlord / agency contacts completed	
Applications advanced or submitted	
Escalations made	
Missed deadlines (if any) + reason	

Carry-Forward to Next Week (must not be lost)

1. _____
2. _____
3. _____
4. _____

One improvement for next week:

_____

Professional Safeguards

This planner is a working tool for Housing Specialists. It does not replace employer case-management systems, escalation procedures or supervision requirements.

- Use case codes rather than full client names on this paper if it may leave a secure environment.
- Urgent safety and legal concerns must follow your organization's escalation pathways — this planner does not replace them.
- Protect client confidentiality in all written and verbal communication.
- When capacity is exceeded, raise it early with your supervisor rather than absorbing risk silently.